Hospitals and polyclinics

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Overview of the hospital segment of the Russian pharmaceutical market based on the results of 2016

The hospital segment amounted to 151.5 billion rubles by value and 801.22 million packages by volume. In these conditions, the market grew by 2% in rubles and decreased by 1% in packages (Figure 1).

Key Features

In 2016, the biggest share of the market belonged to hospitals reporting to the Ministry of Health (88% in money and 88.5% in packages), while hospitals of a different subordination had a somewhat smaller share (4.1% by value and 3.7% by volume), the polyclinics of the Ministry of Health had 2% by value and 2.9% by volume, outpatient polyclinics of other subordination got the smallest share of the shipments, i.e. 0.2% by value and by volume (Figure 2).
The drugs included in the VED list made up for 78.2% of the value of shipments, which corresponded to a share of 88.0% by volume, in 2016. These were mainly prescription drugs (95.6% by value and 90.6% by volume) (Figure 3), while dietary supplements accounted for less than 1% of all shipments.

The weighted average price per package in the segment of hospital shipments increased by 3%, to 189.1 rubles in 2016 (Figure 4). At the same time, the weighted average price of a drug not included in the VED list was 344 rubles, a VED list drug price amounted to 168 rubles, a prescription drug price, to 87.7 rubles, an over-the-counter drug price, to 199.7 rubles.
Almost every third ruble in the hospital segment was allotted to the Central Federal District, 14.5% of all shipments in value terms were attributed to the Volga Federal District. The Siberian Federal District (12.6%) and the North-West Federal District (12 , 0%) got slightly less. The top three in terms of shipments to health facilities in physical terms are the same districts, with the shares of 27%, 21.9% and 13.2% respectively (Figure 5).

The ATC group "J - Antimicrobial products for systemic use" occupies almost a quarter of the total shipments in the hospital segment (22.8% by value and 25.6% by volume) and the 1st place in the value of shipments, despite the relatively low weighted average price per package, slightly exceeding 160 rubles. The group "L - Antineoplastic and immunomodulating agents" is second in the top list by value of shipments, slightly inferior to the leader. However, it occupies one of the last places in the ranking by volume of sales in packages, with a share of 1.2%. The weighted average price per package for the products of the group L is the highest in comparison with other ATC groups and amounts to 3154 rubles. The group "N – Medicinal products for the treatment of nervous system diseases" comes 3rd by value of shipments in rubles, with a share of 10.4% and a weighted average price per package of 199.8 rubles. The minimum weighted average price per package was observed in the group "D – Medicinal products for the treatment of skin diseases", 59.9 rubles were spent per package of the products of this group (Figure 6).

Rankings

In 2016, the product range of the hospital segment consisted of products manufactured by 1,052 corporations, including 2,125 international non-proprietary names, and was represented by 5,851 brands, including 22,004 SKU * in total.

The product with INN Sodium chloride, which are part of a number of ATC groups of different manufacturers, ranked first by sales value. The antibiotics with INN Meropenem occupied the 2nd place, rising by three points of the rating due to a 21% increase in shipments. INN Ceftriaxone dropped to the 3rd place. The maximum growth of shipments by + 45% was registered by INN Paclitaxel, due in many respects to the brand Taxacad.

The company *Biocad* rose to the first line of the rating of the corporations manufacturers of drugs supplied to health facilities, with a maximum increase in the TOP10 index, + 69%. The company's portfolio consists mainly of antitumor drugs. The companies *F. Hoffmann-La Roche Ltd* (-19%) and *Sanofi* (-20%) that lost one point each were 2nd and 3rd in rankings (Table 1).

The company *Sintez OJSC* is on the 1st place in the rating of corporations by volume of shipments in physical terms. Its portfolio features almost 140 brands, including some products of the TOP10, such as Sodium chloride, Ceftriaxone, Glucose, Ethyl alcohol, Metronidazole, Ciprofloxacin. The 2nd place is occupied by *Biosintez*, whose total purchases decreased by 26% in 2016. The company *Kraspharma* broke into TOP10 and immediately got the 3rd place, with the increase in shipments by 73%. The maximum increase in shipments in the TOP10 was reached by *Mospharm* (+ 372%), the lowest growth, by *Biochimic* (-33%) (Table 1).

Sodium chloride, produced by more than 50 plants is on the 1st place of TOP10 both in value and in volume. Ceftriaxone rose to the 2nd place with the maximum increase in volume of shipments in rubles among the TOP10 brands (Group of producers, + 33%). Herceptin (*F. Hoffmann-La Roche Ltd*) dropped to the third place (-27%) (Table 2).

All the representatives of the TOP10 trade names by purchases in packages are produced by several corporations, usually in the form of unbranded drugs. Ceftriaxone with the maximum increase in TOP10 (+ 63%) is on the 2nd place, Glucose (-6%) is on the 3rd place. The purchases of Metronidazole (-7%) decreased more than for the other drugs in the TOP10 (Table 2).

In 2016, the hospital segment of the pharmaceutical market reached 151.5 billion rubles by value and 801.2 million packages by volume. The average price in the segment amounted to 189.1 rubles. The health care facilities mostly got the shipments of prescription drugs (95.63% by value and 90.57% by volume) and drugs included in the VED list (78.24% by value and 88.04% by volume). Sodium Chloride was the leader as to the shipments of drugs by INN and brands, Among the ATC groups, the value of shipments of the group "L - Antineoplastic and immunomodulating agents" (+ 14%) grew most actively. This group also had the highest average price for a drug package (3,154 rubles).

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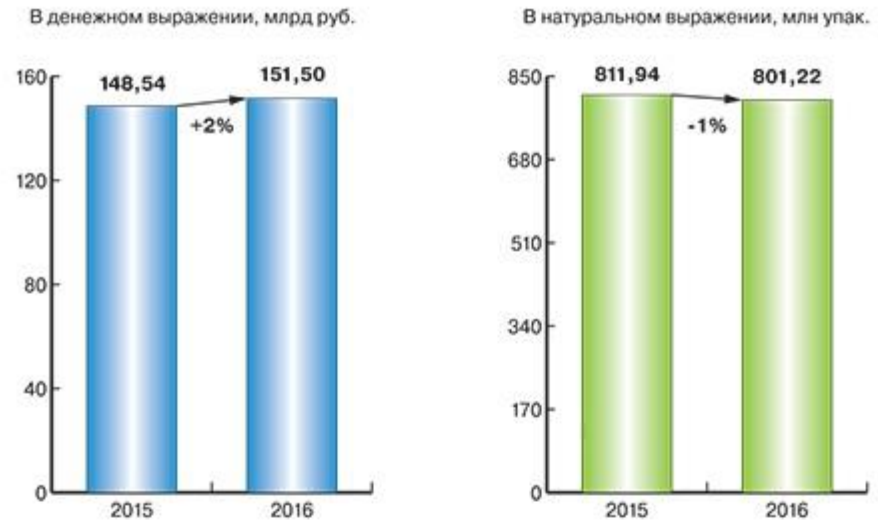
* SKU (stock keeping unit) is item in product range (a unit of one group of goods, brand, grade in one type of package of one dimension, volume, color, etc.). It is represented by the individual features specific to a product. For example, *L-thyroxine, 100 mcg tablets No. 100 (Ozon).*

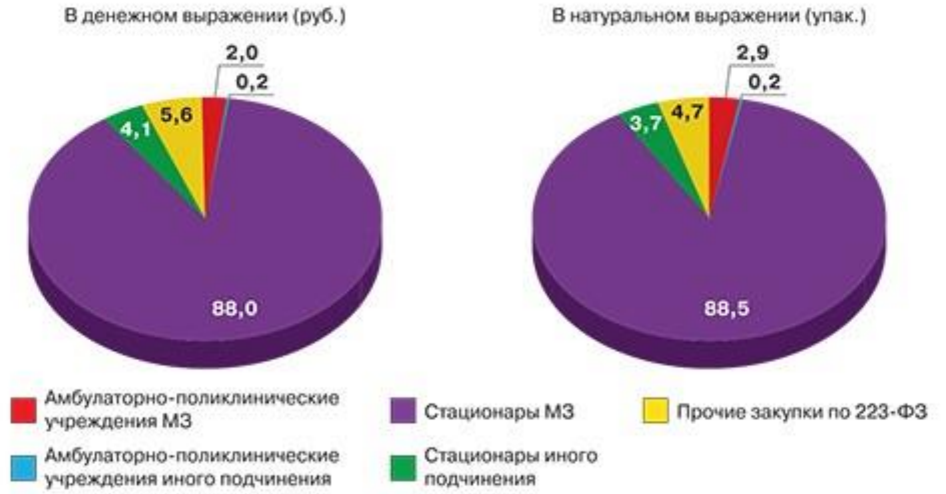
Динамика госпитального сегмента фармрынка, 2015—2016 гг.



Источник: AlphaRM — Отгрузки ЛС в ЛПУ в РФ

Рис. 1

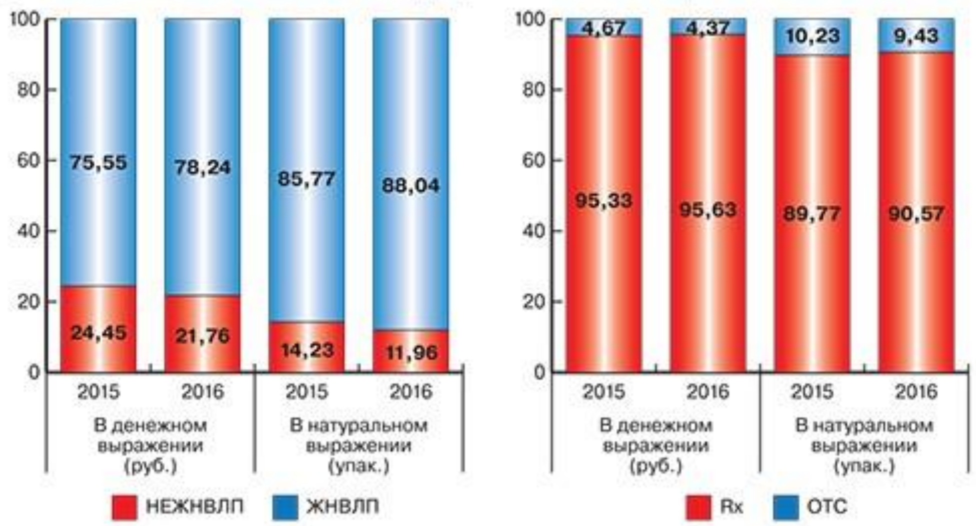
Долевое соотношение отгрузок в детализации по типу лечебного учреждения в госпитальном сегменте фармрынка в 2016 г., %



Источник: AlphaRM — Отгрузки ЛС в ЛПУ в РФ

Рис. 2

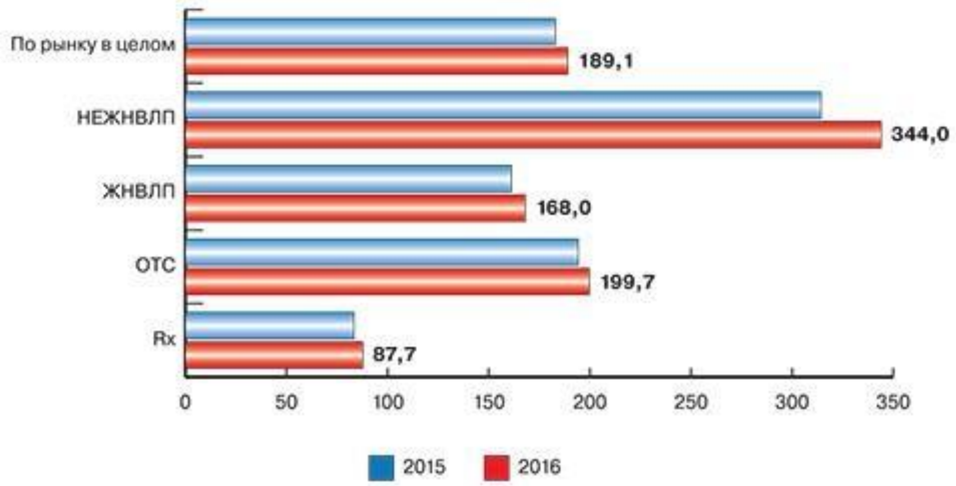
Динамика долевого соотношения препаратов по их принадлежности к Перечню ЖНВЛП и по условиям отпуска из аптек в госпитальном сегменте фармрынка в 2015—2016 гг., %



Источник: AlphaRM — Отгрузки ЛС в ЛПУ в РФ

Рис. 3

Динамика средних цен в госпитальном сегменте фармрынка в 2015—2016 гг., руб.



Источник: AlphaRM — Отгрузки ЛС в ЛПУ в РФ

Рис. 4

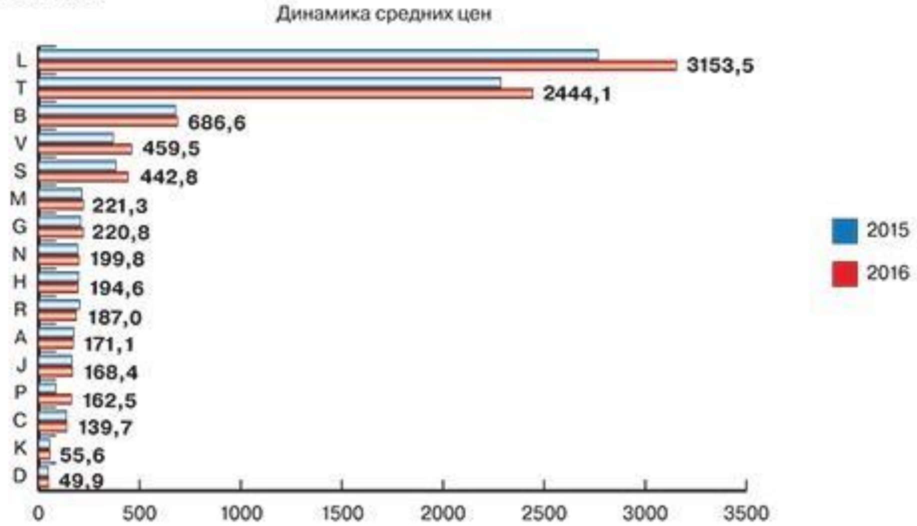
Распределение отгрузок по федеральным округам в госпитальном сегменте фармрынка в 2015—2016 гг., %

*Поскольку с 28 июля 2016 г. Крымский федеральный округ законодательно упразднен и его территории включены в состав Южного федерального округа, все исторические данные по Крымскому федеральному округу включены в данные Южного федерального округа за весь исторический период

Источник: AlphaRM — Отгрузки ЛС в ЛПУ в РФ

Рис. 5

Динамика средних цен в детализации по АТХ-группам в госпитальном сегменте фармрынка в 2015—2016 гг., руб.



Источник: AlphaRM — Отгрузки ЛС в ЛПУ в РФ

Рис. 6

The TOP10 corporations by volume of shipments in the hospital segment of the pharmaceutical market, 2016					
a) By value, rubles					
Ranking	Change in ranking	Corporation	Value of shipments, million rubles	Share of shipments, %	Increase in shipments, 2016/2015, %
1	6	Biocad	5,055.3	3.34	69
2	-1	F.Hoffman-La Roche Ltd	4,438.5	2.93	-19
3	-1	Sanofi	4,192.1	2.77	-20
4	2	Pfizer	3,426.7	2.26	5
5	-2	AstraZeneca	3,212.5	2.12	-10
6	-2	Bayer Group	2,931.0	1.93	-11
7	1	Abbott	2,743.9	1.81	6
8	1	Merck Sharp and Dohme BV	2,677.7	1.77	11
9	-4	Novartis Pharma AG	2,657.4	1.75	-19
10	1	Johnson & Johnson	2,270.2	1.50	4
TOP10			33,605.2	22.2	-2
b) By volume, packages					
Ranking	Change in ranking	Corporation	Value of shipments, million rubles	Share of shipments, %	Increase in shipments, 2016/2015, %
1	-	Sintez OJSC	25.01	3.12	27
2	-	Biosintez	9.68	1.21	-26
3	9	Kraspharma	9.03	1.13	73
4	61	Mospharm	6.96	0.87	372
5	4	Dalchimpharm	6.49	0.81	14
6	1	Escom NPK	6.39	0.80	1
7	19	Medsintez	6.15	0.77	124
8	-4	Valenta Pharmaceutica	5.79	0.72	-20
9	-4	Sanofi	5.11	0.64	-27
10	-7	Biochimic	5.06	0.63	-33
TOP10			85.69	10.69	13

Source: AlphaRM – Shipments of medicinal product in health facilities in Russian Federation Table 1

The TOP10 trade names by volume of shipments in the hospital segment of the pharmaceutical market, 2016						
a) By value, rubles						
Ranking	Change in ranking	Trade name	Corporation	Volume of shipments, million rubles	Share of shipments, %	Increase in shipments, 2016/2015, %
1	-	Sodium chloride	Group of manufacturers	6,450.0	4.26	8
2	1	Ceftriaxone	Group of manufacturers	2,084.3	1.35	33
3	-1	Herceptin	F.Hoffman-La Roche Ltd	1,779.3	1.17	-27
4	1	Curosurf	Torrex Chiesi Pharma GmbH	1,382.3	0.91	-6
5	5	Sevoran	Abbott	1,244.4	0.82	9
6	-	Clexan	Sanofi	1,204.8	0.80	-11
7	-	Glucose	Group of manuracturers	1,172.7	0.77	-8
8	4	Actilyse	Boehringer Ingelheim International GmbH	1,143.2	0.75	10
9	-5	Ultravist	Bayer Group	1,068.7	0.71	-30
10	-2	Lucentis	Novartis Pharma AG	1,063.7	0.70	-14
TOP10				18,557.5	12.2	-14
b) by volume, packages						
Ranking	Change in ranking	Trade name	Corporation	Volume of shipments, million rubles	Share of shipments, %	Increase in shipments, 2016/2015, %
1	-	Sodium Chloride	Group of corporations	184.55	23.03	2
2	-	Ceftriaxone	Group of corporations	63.22	7.89	63
3	-	Glucose	Group of corporations	32.87	4.10	-6
4	-	Cefotaxime	Group of corporations	25.44	3.17	-1
5	-	Ethyl alcohol	Group of corporations	19.72	2.46	11
6	-	Cefazolin	Group of corporations	11.62	1.45	-4
7	-	Metronidazole	Group of corporations	10.45	1.30	-7
8	1	Ciprofloxacin	Group of corporations	8.52	1.06	6
9	6	Ringer solution	Group of corporations	8.30	1.04	12
10	1	Chlorhexidine	Group of corporations	8.27	1.03	5
TOP10				372.95	46.55	8

Source: AlphaRM – Shipments of medicinal product in health facilities in Russian Federation Table 1